

**Checklist for Separating Staff Member’s Supervisor**

**Note: This checklist is for use by supervisors in managing the separation of staff members for whom they are responsible. Depending on the type of separation, more or less liaison will be required with the Office of People and Culture. See the Guide “Managing Separations” available via the Supervisors’ page on the OPC website.**

**Managers are responsible for advising OPC *immediately once* they know that a staff member will be leaving their employment.**

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| --- | --- | --- | --- | --- |
| **Name** | | Last day at work / / | | |
| **Employee No** | |  | | |
| ***Action*** | | | ***Notes*** | *or*  |
| 1 | Advise OPC  If unique circumstances apply (eg death, abandonment) contact HR  immediately by phone  Add other specific or local items to this checklist for follow up | | Email HR Coordinator |  |
| 2 | Advise employee of Separation Checklist for staff members on OPC  website & encourage its use | |  |  |
| 3 | Obtain written acceptance of separation from Dean/Director and forward copy to OPC | |  |  |
| 4 | Ensure that all forms of leave have been approved and approvals  have been submitted to OPC or recorded on Staff Online.  Please ensure all flex leave or credit hours are taken or if not advise the number of hours to be paid out (at ordinary time). Any debit hours will be deducted from accrued annual leave.  If there are outstanding leave forms for this employee please advise  OPC urgently via email the details of the outstanding leave.  This is important to avoid overpayment. | |  |  |
| 5 | Advise employee of exit survey accessible via OPC website | |  |  |
| 6 | Discuss with the staff member what steps they will take to hand over their work in progress and deal with any other incomplete workplace matters | |  |  |
| 7 | All TRIM files assigned to the departing staff member must be assigned to a new location (either another staff member, or a records storage location) and moved to that location, if they are physical files. All documents in the departing staff member's Top-drawer must be checked back into TRIM | |  |  |
| 8 | If the employee is an academic or university administrator who is retiring draw their attention to the “Retired Academics Database” - see Retired Academics & University Administrators program website [www.acu.ac.uk](http://www.acu.ac.uk/) | |  |  |
| 9 | OPC will notify key personnel in relation to security, communications and staff service about the separation , however, ensure that you   * receive from the employee their Staff Identification Card and return it to OPC   and make appropriate local/campus arrangements for the following:   * keys / access card * University communication equipment * University credit card * TEMS expense report for corporate credit card expenses * University Vehicle * Any other university property/documents/books etc.   Please confirm to OPC via email that these matters have been attended to | |  |  |

*Last updated July 20167*